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Rhode Island Infrastructure Bank Efficient Buildings Fund
Guidance on Submitting Your Energy Usage Baseline

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You cannot manage what you do not measure. This premise is why the first step toward saving energy is tracking and analyzing the energy consumption of your facilities. Over the past several years, as part of the Rhode Island Public Energy Partnership, the Office of Energy Resources (OER) contracted with the University of Rhode Island Extension Outreach Center to complete energy "baselines" for all Rhode Island municipalities and public school districts. This best practice serves as a quantitative starting point for achieving deep energy savings and a foundation for ongoing monitoring.

In cases where we were able to connect with the municipality or school department, we attempted to collect all the necessary information to create facility profiles in ENERGY STAR Portfolio Manager, a free online energy monitoring tool developed by the U.S. Environmental Protection Agency. In addition to monthly energy consumption and expenditure, this data includes account numbers, square footage, property use details, operating characteristics, etc. Portfolio Manager uses this information to calculate an energy use intensity ($kBtu/ft^2/yr$) and greenhouse gas emissions for each facility. In cases where we were not able to connect with the municipality or school department, we gathered more limited data from National Grid and stored it in Excel files but did not complete a Portfolio Manager profile.

Choose one of the following options based on your situation:

➢ If you have a baseline completed by URI or on your own, follow the instructions under the "What to Submit" section below.

➢ If you need assistance in accessing/updating your Portfolio Manager account or completing your baseline, or do not know the extent to which your baseline has been completed, email rachel.sholly@energy.ri.gov to be connected to a member of the URI energy team.

➢ If you are a quasi-public entity and do not have a baseline, email rachel.sholly@energy.ri.gov.

WHAT TO SUBMIT: Applicants should submit the information described below in both electronic form and in hardcopy as attachments to the application.

(1) **Energy Usage Baseline:** At least two (2) years of annual consumption and expenditure data for each energy utility (electric, gas, oil and propane) for each facility managed by the applying entity. Data prior to 2010 should not be included. The baseline must include at least electric and natural gas information for **EVERY** facility that is owned or operated by the applicant, not just those being considered for project financing in this application. We strongly recommend that the baseline also include oil and propane information for each facility, however, oil and propane information is only required for those facilities that are included in your application.

Those using Portfolio Manager should follow the instructions on the next page.

(2) **Baseline Narrative:** A narrative, no longer than one (1) page, outlining the major findings of the energy data baseline. The analysis should include observations on:
- Facilities with the highest energy consumption and/or expenditure
- Facilities with the highest energy use intensity and/or cost per SQFT
- Facilities that have a noticeable increase or decrease in energy consumption and/or expenditure over time
- Potential reasons why facilities are showing certain data trends

Submitting Your Energy Data Baseline
with Portfolio Manager

To streamline the process of submitting your Energy Baseline, we have created a custom report "template" in Portfolio Manager that we can directly upload to your account. Follow the steps below to access and submit your Energy Baseline.

1. **Request the Report Template**
   ➢ Email rachel.sholly@energy.ri.gov to request that the report template be uploaded to your Portfolio Manager account.

2. **Log into Your Portfolio Manager Account**
   ➢ If you need assistance logging in, email rachel.sholly@energy.ri.gov to be connected to a member of the URI energy team.

3. **Review Your data**
   ➢ Once you are logged in, review your data to ensure that it includes at least two (2) years of monthly consumption and expenditure data for each energy utility (electric, gas, oil, propane, etc.) for all facilities that you own or operate.
   ➢ Make sure all energy usage and expenditure information is complete, accurate and up-to-date. Any missing data will result in "not available" appearing in your report, which will impede your ability to write an accurate baseline narrative.

4. **Access the Report**
   ➢ In your Portfolio Manager account, navigate to the page titled "Respond to Data Request."
   ➢ Under "Your Response," select "All Properties" to ensure that the report includes all of your accounts.

5. **Generate Response Preview**
   ➢ Select "Generate Response Preview" at the bottom of the page.
   ➢ This will generate a new report which will be highlighted in green under "Templates and Reports."

6. **Download Preview in Excel**
   ➢ In the dropdown menu under Action, select "Download Preview in Excel" to access the new report.
   ➢ Verify that all information is correct and complete.
   ➢ If there is missing or incorrect information, go to the "My Portfolio" tab to add or correct it.

7. **Submit Your Baseline**
   ➢ If the information in the preview is correct and complete, save the Excel document and submit it electronically and in hardcopy as part of your complete Efficient Buildings Fund application package.

For additional information, refer to this Portfolio Manager training video:
https://www.youtube.com/watch?v=dqfzoCGIlDc

Questions can be directed to rachel.sholly@energy.ri.gov

Writing Your Baseline Narrative

Your Baseline Narrative should be no longer than one (1) page and should outline the major findings of the energy data baseline. The analysis should include observations on:

- ✓ Facilities with the highest energy consumption and/or expenditure

- ✓ Facilities with the highest energy use intensity and/or cost per SQFT

- ✓ Facilities that have a noticeable increase or decrease in energy consumption and/or expenditure over time

- ✓ Potential reasons why facilities are showing certain data trends

Helpful Hints When Writing Your Baseline Narrative

- The first step is to review your Portfolio Manager account. Take a look at each property in your portfolio, review the reports available to you on your Portfolio Manager "Reporting" tab, and write about the story being illustrated by the data.

- Your narrative should demonstrate that you have analyzed your data for ALL buildings (not just those applying for project funding). Be sure, therefore, to look at your entire portfolio when considering notes such as facilities with the highest energy consumption or facilities with the highest energy use intensity.

- Make use of numeric values that you find in your Portfolio Manager account by referencing specific numbers for EUI, kBtu, kWh, therms, dollars, etc.

- The narrative may help justify why you are applying for project funding in specific sites. Be sure, therefore, to include several reasons why your facilities are showing certain data trends. For example, you can look to your audit report that suggests a building may have inefficient lighting or poor insulation. These could be "potential reasons why facilities are showing certain data trends."

- You may want to look at your community's total energy consumption (the aggregate kBtu consumption of all facilities). You could use these values to understand how much your community could potentially save with 5%, 10%, or 20% community-wide energy reductions. This will be helpful in developing your Energy Management Plan.

- Energy Use Intensity is defined as your building's total energy usage (kBtu) per square foot.

NOTE: The URI energy team can schedule a meeting with you to discuss your Portfolio Manager account in detail and provide an in-person training on how to use the tool for maintaining and interpreting the data set and utilizing reporting features.